Job Description

Working Title:	CUSTOMER SERVICE CLERK
Position Type:	PERMANENT
FTE (ie: 1.0, 0.5):	1.0
Classification:	LEVEL 2
Division:	FINANCIAL SERVICES
Department:	CORPORATE SERVICES
Reports To:	REVENUE SERVICES SUPERVISOR

☐	New Position
☒	Update of current position
☐	Significant changes (at least 50% of job has changed) – Job Evaluation required

SECTION 1: PURPOSE OF POSITION

The Customer Service Clerk is responsible for creating a welcoming office environment and supporting residents, and Town Department's functions. Responsible for processing and reconciling of all account payments. This position requires discipline to effectively operate multiple software and payment systems providing Accounts Receivable duties for all Town Office, CSD, and Fire Department.

The front counter is often fast paced and requires a high level of multitasking ability with strong attention-to-details skills to maintain accuracy. This position often coordinates with multiple staff within the organization to ensure customer service is provided. This necessitates an ability to prioritize their workflow, often faced with heavy interruptions to ensure timely completion.

SECTION 2: KEY RESPONSIBILITIES

Time Percentage	Key Responsibility
30%	**Front Counter & Customer Service** • Reception duties for Town Office, receive and forward direct dialed calls or message details to staff via teams or email details to staff offsite when necessary • Handle customer concerns and complaints professionally, escalating complex matters when necessary • Ensure security by monitoring visitor passes and check in/our process • Welcome and direct visitors to meeting room booking with internal and external team members or community groups. • Provide and accept subdivision appeal applications • Liaison for CSD department, provide help phone numbers, brochures, and marketing paraphernalia • Prepare new resident information packages with Town and Tri-area maps and activity brochures, recycling, and garbage information, provide for new utility accounts • Stay apprised with events occurring within the Town to provide residents with information • Maintain information and services in foyer including scheduling Foodbank pickup, Lions Eyeglass donations, Brochure display organization. • Assistance and distribution ATS rider applications and trip prices. • Ensure and maintain messaging of office closures are referenced on switchboard and entrance doors
15%	**General Office Administration** • Maintain visitor log, sign in/sign out • Responsible for opening and distribution of the incoming mail • Assist staff with outgoing postage or registered mail and courier service waybills • Responsible for front door lock-up and cash lock up • Daily BRINKS service, maintain written record of P&D, Finance, CAPS, Golf Course bank deposits • End/start of day cash retrieval to/from vault and Moneris machines closed • Filing documents for retention, both paper hard copies and/or electronic filing system • Knowledge and understanding of ATIA legislation • Maintain a clean, organized, and welcoming front-counter environment

50%	**Financial Administration & Banking**
	• Maintain working proficiency in multiple software and payment systems, internal ERP (Muniverse), Perfect Mind, QuickBooks, Vix/Arc Transit
	• Coordinate with staff within the organization and provide all Department's accounts receivable invoices
	• Coordinate with Community Service staff relating to ATS payment or facility rental payments for contracts
	• Maintain accurate records for general accounts, including overpayments, or inactive tax search accounts are closed and refunded
	• Complete monthly tax certificate billing and statements
	• Apply monthly penalties to overdue General accounts
	• Provides Customer Relations, reprint invoices or statements and general inquiries
	• Report irregularities and discrepancies to the appropriate Finance personnel
	• Prepare and post correcting account adjustments
	• Prepare all necessary reports and trial balances and
	• Maintain a balanced sub-ledger
	• Prepare and process banking files for pre-authorized property tax payments twice monthly and utility pre-authorized payments
	• Posting of Mortgage Property tax batch payments
	• Monthly invoice and receipt payments for ACWRC
	• Process NSF payments, and issue letters
	• Prepare documents as required for collection agency
	• Scan, digitize, and upload incoming and existing paper documents into the organization's OnBase electronic document management system
	• Ensure payments are accurately posted to the appropriate customer accounts or organization's ledger accounts
	  ○ Property Taxes and Utilities
	  ○ Bylaw fines and infraction tickets,
	  ○ ATS driver batches payments and receipting
	  ○ RCMP criminal records revenue
	  ○ PerfectMind facility & recreation booking payments
	  ○ Local Transit and ARC media sales.
	  ○ Cemetary sales transactions
	  ○ Process payments for CSD and Youth Centre events
	  ○ ATIA requests
	  ○ Staff Social club activities
	• Coordinate customer's contact information changes with multiple staff, ensuring system accounts are keyed accurately or notify of updates as required.

5%	**Other Duties** • Designated position with fire warden duties. Attend training and maintain awareness for safety and emergencies • Provide training for casual staff or temporary positions for backfill as required • Perform other duties and special projects as assigned and within the scope of this position • Responsible for actively engaging in the health and safety program and be held responsible for the health and safety duties and responsibilities as outlined in Element 1 of the Health and Safety Manual

SECTION 3: SUPERVISION OF OTHERS

Position Title	Direct	General
	☐	☐

SECTION 4: QUALIFICATIONS

Level of education and experience required:

- Accounting certificate or equivalent training
- Training or experience with Accounts Receivable Systems and processes
- 3 – 5 years general office experience preferably in a municipal setting or equivalent

Required designations, licenses, Certificates required:

Required Knowledge, Skills and Abilities:

- Exceptional customer service and interpersonal communication skills
- Strong numerical aptitude and attention to financial detail
- Excellent organizational skills
- Ability to manage competing priorities while maintaining accuracy and professionalism
- Excellent written and verbal communication skills
- Ability to work independently while collaborating with multiple departments
- Previous cash handling experience
- Demonstrated adaptability in a busy, public-facing environment
- Ability to handle confidential financial and personal information appropriately.
- High degree of accuracy when handling significant financial transactions
- Strong technical aptitude and ability to learn and navigate multiple specialized software systems

Software/Technology

- Proficient knowledge of Microsoft Office Suite (Word, Outlook & Excel)
- Experience navigating custom ERP financial systems
- Salesforce experience would be considered an asset
- QuickBooks experience would be considered an asset
- POS experience, Moneris portal payments and ARC media sales.

PHYSICAL EFFORT	
☒	Routine office environment. Limited physical effort. A variety of typical office requirements such as sitting, standing and walking. Limited physical effort. Limited intense visual concentration is required. Infrequent physical effort (lifting, bending, etc); Infrequent peaks of concentration are necessary for short periods from time to time (e.g. several minutes up to half an hour) Interruptions or distractions occur occasionally, but do not interfere with completion of quality of work as the nature of the work is highly repetitive and routine
☐	Moderate physical effort, requires occasional lifting, bending, standing, climbing ladders, etc. Requires extended periods of standing or moving. Manual dexterity can include handling of items or tools of various sizes, sorting or manipulating small parts or materials or tools, where the pace of work can largely be controlled. Intense visual concentration is greater than 50% of the time.

	Moderate peaks of concentration (e.g. up to half day) are a typical, with some ability to control this by taking breaks from the task. Interruptions or distractions occur frequently and sometimes interfere with output quality or timeliness. Time pressures with the job are noticeable, but are not frequent or significant. May perform a moderate level of heavy physical activities (pulling, lifting, pushing heavy or awkward objects, etc). May require some specialized training and/or use of safety equipment.
☐	Regular, frequent or sustained and considerable physical effort is required with limited opportunities to rest except at scheduled breaks. May require a degree of major physical effort over an extended period of time. Requires frequent or regular considerable moving, standing or heavy physical activities (e.g. lifting, moving, or pulling heavy awkward objects on a regular basis). Typically requires some specialized training (certifications, etc) and/or use of safety equipment. May also require personal protective equipment. Regular, frequent or sustained, and substantial peaks of concentration are a typical throughout the day. It may not be possible to take breaks from tasks due to time pressures and deadlines that often oblige continuation until task completed. Interruptions and distractions occur frequently, and often to significantly interfere with the ability to complete the task correctly/in timely manner and consistently.
WORK ENVIRONMENT	
☒	Routine office environment. Limited exposure to disagreeable aspects such as noise, heat/cold, dust, fumes, etc
☐	Moderate exposure to disagreeable aspects of the work environment. The job may require occasional exposure, but is limited in terms of frequency, severity, and/or duration. May require some specialized training, and/or use of safety equipment.
☐	Considerable, frequent or ongoing exposure to disagreeable aspects of the work environment. The job requires regular exposure in terms of frequency, severity, and/or duration. Typically requires some specialized training (certifications, etc), and/or use of safety equipment. May also require personal protective equipment.

Employee Name (if applicable): _____

Reviewed by Employee: _____

Reviewed by Manager: _____

Review Date: _____